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Association of Indian Organic Industry

NEWS LETTER

Our aim is to meet the demands of global markets for organic agro products.

Shri Narendra Modi
Prime Minister of India

- Global Investors' Summit 2014 in Indore, M.P.

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FROM THE CEO's DESK

Dear Friends,

Welcome to the first AIOI Newsletter.

Organic industry's reputation is our most treasured asset and the foundation on which we have built AIOI. Every stakeholder knows that the only way to protect and improve our organic integrity is to match the consumer expectations, meet our commitments, innovate our businesses and deliver excellence. AIOI mantra is Excellence Delivered.

Recent market surveys project India's organic food market to exceed $2 billion by 2024. Domestic consumption of organic food has shown a compounded growth of 13-15%, opening new opportunities for everyone.

Past years have been very significant in the growth of the Indian organic industry due to changes in the regulations, for both export and domestic markets. India's organic food market was growing at 17% annually due to the rising demand for health and wellness products domestically and across the world. India is ranked #1 in organic production and 9th in area under cultivation. Enhancing direct linkage of local producers with buyers, as well as boosting processing potential of organic output will be key to growth. Value addition and branding would be instrumental in achieving government's target of doubling farmers' income and agricultural exports.

As the world gears up for a long and arduous fight against the Corona pandemic, it is important to understand that the post COVID-19 world could be strikingly different, not only in material terms but also in sentiment. We need a whole new approach to running businesses, catering to demand and managing supply chains. Meaningful processes across multiple stakeholders and enhanced branding are the need of the hour to re-imagine India as the organic food bowl of the world and to make a '**Atmanirbhar Bharat**'.

AIOI, a member driven association of organic stakeholders, came into existence after extensive consultations within the industry. In 2020, AIOI shifted to its new office in Delhi and developed its website (www.aioi.org.in), stabilized and strengthened member relationships, defined and institutionalized operational processes and started conversations with new stakeholders. It is important that the industry remains deeply involved in dissemination of best practices and help shape conducive policies to enable orderly growth and market development. We appreciate the continued commitment to growth of the organic sector and are confident we can make this rewarding.

This e-newsletter edition highlights organic farming and eco-agri revolution, facilitating India's rightful place in the global organic market.

I hope you enjoy reading this newsletter and we look forward to your feedback so that we can continuously add value to it.

Best wishes to you and your families, safe and good health during this difficult time.

AIOI family

FACILITATING INDIA'S TRADE IN ORGANIC PRODUCTS

S. Dave

S. Dave is the former Chairperson of Codex Alimentarius Commission and former Advisor to the Food Safety and Standards Authority of India.

The views expressed are personal.

Common man believes that an organic food product is the one that is free of chemical pesticides. Scientifically speaking, that is right. It is not just freedom from chemical pesticides but also other inorganic chemicals. However, there is much more to it. The concept of organic farming addresses larger issues like environment protection through biodiversity, sustainable farming practices, improving soil fertility, denying the use of synthetic fertilizers and, very importantly, genetically modified organisms and growth promoters. Certain chemicals can, however, be used that contain targeted micronutrients necessary for growth. In short, it is supposed to be an integrated approach to sustainability at the farm level. No wonder, our Hon'ble Prime Minister has time and again been highlighting the need to support organic farming; conventional farming is literally killing our soil (for instance, in Punjab).

Organic products are not just fruits and vegetables; we also have organic wheat, rice and other cereals; we have organic spices, tea, coffee, honey, milk, butter, ghee and cheese. There are organic meat, poultry and aquaculture products. In addition, we also have organic cotton and silk, which give us organic garments as well as organic cosmetics. One can also find a variety of organic products including ready-to-eat foods in super-markets abroad. A very wide variety of organic infant foods and foods for young children are available internationally, and mothers are only too eager to give organic food to their children for health and safety reasons. Ladies buy organic cosmetics too. One can also buy organic silk scarves, stoles and ties.

In case of milk products, meat, poultry etc., it is extremely important to ensure that the animal or bird feed is also organic in nature. Organic honey is not easy to produce in bee-hives because of the challenges to prevent bee mortality for which the farmers give them antibiotics in bee-feed on a prophylactic basis. It not only compromises with the integrity of organic nature of honey, its residues in honey lead to another health issue called anti-microbial resistance. Similarly, organic integrity in eggs and poultry can be severely compromised by the use of prophylactic drugs in bird-feed to prevent bird mortality. The short point is that in case of every organic food, element of trust is supreme, either on the part of producer, manufacturer, trader, retailer, exporter or the certification body.

Organic Standards at the International Level

At the international level, Codex Alimentarius Commission has developed guidelines for labeling and marketing of organic products. In addition, International Federation of Organic Agriculture Movement (IFOAM), a German NGO has developed guidelines for production, certification and marketing of organic products. Several countries including Australia, Canada, European Union, India, Japan, Korea, Switzerland, USA and many developing countries have set up regulatory mechanism for organic food based on Codex guidelines.

Regulation of Organic Products in the International Market

The primary responsibility of promoting export of organic food products lies with APEDA under the Ministry of Commerce, that introduced the National Programme for Organic Production (NPOP). It was launched by our former Prime Minister, Hon'ble Shri Atal Bihari Vajpayee on 08 May 2000 with the objective of having a uniform system for production and certification of organic products. To ensure a regulatory monitoring system for enhancing exports, the NPOP was notified under the Foreign Trade (Development and Regulation) Act to provide a legal base. APEDA also introduced a traceability mechanism for production, processing and trading for exports. India was the first country to have introduced traceability for the organic sector and it includes livestock products, aquaculture products and cotton.

The legal base formed the basis for an equivalence arrangement with the European Union and Switzerland for our exports. At the same time, the US also agreed to recognize APEDA's Conformity Assessment procedures with their standards.

Regulation of Organic Products in the Domestic Market

For the domestic market, AGMARK, under the Department of Agriculture notified the NPOP document as a voluntary certification programme more than a decade ago. As expected, there were no takers. By then, Food Safety and Standards Act was notified in 2006. Section 22 of this Act requires that organic foods can be manufactured, distributed sold or imported in accordance with specified organic production standards notified under the Act.

FSSAI notified a Regulation for organic products in January, 2017. Currently, FSSAI has adopted two systems (i) NPOP and the certification system implemented by APEDA under its accreditation programme; and (ii) the Participatory Guarantee System (PGS) of the Ministry of Agriculture and Farmers' Welfare. PGS is a quality assurance initiative of the Ministry according to which participation of producers, consumers and other stakeholders is emphasized; and they can operate outside the framework of third party certification. Thus, farmers, consumers, etc. in a village or an area can certify each other for sale in the market. In both systems, traceability up to the producer level will have to be established to maintain the organic integrity of the food product. In addition, the FSSAI Regulation and the related Directive notified on 29 June 2018 exempt, from the application of NPOP and PGS, organic food which is marketed through direct sales by a small original producer or producer organisation (defined as having an annual turnover not exceeding Rs. 12 lakhs), to the end consumer. There is a PGS portal wherein all PGS farmers are required to be registered. These farmers can switch to certification after the conversion period of 12 months, when they should get linked to the APEDA traceability system.

The Regulation recognizes reciprocal arrangements for facilitating trade in organic products. In respect of imports under bilateral or multilateral agreements on the basis of equivalence of standards between NPOP and the organic standards of the respective exporting countries, the organic food shall not be required to be re-certified on import into India subject to their compliance with the provisions of the Act, the rules and regulation made there under. Such consignments shall have to be accompanied by a Transaction Certificate issued by an Accredited Certification Body covered under terms of the equivalence agreement.

The Regulation also requires compliance with other applicable FSSAI Regulations. It, however, makes an exception for residues of insecticides. The maximum limit has been fixed at 5% of the MRLs mentioned in the Regulation for Contaminants, Toxins and Residues or the Limit of Quantification (LoQ), whichever is higher.

Implication on Trade

As per the SPS Agreement, an exporting country is required to comply with the regulations of the importing country. To facilitate trade, Codex standards are taken as the reference standards. Codex has adopted guidelines for countries to consider while setting their own legislations for organic products. In line with the principle of non-discrimination under the SPS Agreement, the regulation applicable for the domestic market will also apply to imported organic products (national treatment).

India's export of organic food is governed by the Regulations of different countries and the certification is also required to be done as per the importing country's regulations. Invariably, the importing countries have established a list of certification bodies under their accreditation system that are, to the exclusion of others, authorized to certify organic products. They even encourage Certification Bodies of exporting countries (for instance, India) to apply directly to their Accreditation Body for accreditation. In cases where there is an equivalence arrangement, unilateral or bilateral, the certification is governed by the agreement. India was the first country to initiate the equivalence dialogue with the EU. The Codex Guidelines for the Development of Equivalence Agreements Regarding Food Imports and Export Inspection and Certification Systems formed the basis of the negotiations. It is a complex time-consuming process and took three years to complete. The fact that it allowed Indian Certification Bodies accredited by the National Accreditation Body (NAB) of the Ministry of Commerce to certify organic products as per NPOP standards helped to bring down the cost of certification and encouraged better delivery of services. A similar arrangement was agreed to with Switzerland. Because of the complex process, the US proposed an expedient process of recognizing APEDA's Conformity Assessment procedures for certifying organic products as per the US legislation and APEDA accepted their proposal. All these were unilateral arrangements for exports from India.

One disadvantage of a unilateral arrangement is that the importing country has the possibility to modify it without consultation with the exporting country or even giving an opportunity to be heard. While the arrangement with US has largely continued, the EU made changes and limited the equivalence arrangement to raw agricultural produce. EU, followed by Switzerland, withdrew the arrangement for value-added processed products and honey on a unilateral basis.

The FSSAI Regulation recognizes reciprocal arrangements for facilitating trade by way of bilateral or multilateral agreements on the basis of equivalence. It, however, does not provide any mechanism about organic food imported outside the framework of such equivalence arrangements though, in my understanding, imports cannot be disallowed. It is also silent about unilateral arrangements. Thus, the following issues arising out of the current FSSAI Organic Regulations need consideration as having a bearing on trade:

a) The FSSAI Regulation does not recognize an equivalence arrangement on a unilateral basis for imports into India. We need to remember that a bilateral or multilateral arrangement is too complex due to diverse national regulatory systems;

b) By implication, therefore, there is no need for foreign Certification Bodies to seek accreditation in India for export to India. In any case, we do not have an accreditation mechanism in respect of the domestic market (including imports). APEDA's mandate is on exports only;

c) By further implication, no country will find any need for making a request to India for a unilateral or bilateral equivalence arrangement as long as the Scope and Transaction Certificates continue to be issued by Indian Certification Bodies accredited under NPOP;

d) FSSAI would have to find a mechanism for monitoring import of organic products under the PGS. Such products are not certified by Certification Bodies;

e) The SOP based on FSSAI Regulation requires the 'Jaivik Bharat' organic logo of FSSAI be displayed on the labels of organic foods (but not on in-conversion products) and requires an additional use of NPOP logo or the PGS-India logo on the packages in respect of organic products depending upon the system being followed. The FSSAI logo is, in any case, mandatory on food products. This means that three logos will be required on the labels. It is assumed that the same requirement would apply to imported organic foods. This is a bit complex and it has been noted that many organic foods imported carry none of these logos. Ideally speaking, there should be one national logo for organic products;

f) Since organic products sold or imported into India must carry the FSSAI organic logo, by implication, APEDA has no locus standi in case of any non-compliance by a certification body with regard to certification [please see (b) above].

Suggestions for Consideration

With a view to facilitating trade, there is a need to undertake a holistic review of India's organic accreditation and certification system. Some key suggestions are given below:

(i) Review the FSSAI Organic Regulations in totality and create room for strengthening India negotiating position with other countries, that are eager to sell their organic food to India. Organic legislations, accreditation and certification systems of many developed countries are quite complex and do not facilitate trade. We need to take this into consideration;

(ii) We need to generate room for export of value-added processed organic foods including livestock based food products;

(iii) Examine the bilateral equivalence agreements entered into by Japan, Korea and Taiwan with EU and the US and learn from them;

(iv) A mechanism for monitoring Scope and Transaction Certificates issued by Indian Certification Bodies accredited under NPOP for imports needs to be put in place. APEDA's focus is primarily on exports;

(v) An accreditation mechanism for foreign certification bodies is also necessary to facilitate trade. It is equally important to examine if the foreign Certification Body is "duly" accredited in the exporting country and keep track of their compliance record. Again, APEDA's focus is primarily on exports;

(vi) We should consider having a single accreditation system in the country covering exports as well as the domestic market (including for imported organic products);

(vii) Co-mingling of non-organic food with organic products is a global challenge. Traceability in the production chain is a critical factor that determines the organic integrity of the product. Such concerns have been expressed in international conferences in the past. We need to make traceability mandatory for sale of organic products in the domestic market (including for imported products), something on similar lines as for exports;

(viii) With regard to imports, the State enforcement machinery as well as FSSAI import staff must understand with clarity what is to be checked and how. Their capacity building is extremely important. Consumer trust will come from a strong certification system;

(ix) Since availability of certified seeds or chemically untreated seeds is an important factor, an accreditation and certification programme independent of the Ministry of Agriculture needs to be introduced for seeds;

(x) It is equally necessary to have an effective co-ordination between FSSAI, APEDA and the organic industry and exchange information on international developments;

(xi) APEDA should strengthen the traceability mechanism and consideration should be given to implement block-chain. FSSAI can take advantage of the TraceNet traceability software introduced by APEDA for exports;

(xii) Consider adopting one national logo for organic products to avoid multiple logos.

THE TIME FOR ECO AGRICULTURE FOR EVERGREEN REVOLUTION

Food production without due recognition of the environment has many times led to unflattering effects on the eco system and the productivity of farms. Eco Agriculture, which balances the need for food production and ecological factors, thus becomes a better alternative. In an interview with Agriculture Today, Padmashri Dr. M. H. Mehta – Internationally known Scientist for his leadership and contribution on ecology and agriculture, elaborates on the relevance of this system of farming.

Also added are the excerpts from his recent interview in South Africa about the acceptance of his 20:20 Model for African Countries.

M.H. MEHTA

Q–1: It is being said that after the Green Revolution, it is now time for Eco Agri Revolution for Ever Green Revolution. What is Eco Agriculture?

Eco Agriculture or Agro Ecology is the approach capable of producing enough accessible food without harming the environment. It is based on the convergence of two scientific disciplines, agronomy and ecology and is a broad term that includes organic farming, biological farming etc.

If the past sixty years led to Green Revolution, the coming decades will be the Evergreen or Eco Agri Revolution or Sustainable Ever Green Revolution.

Q–2: We understand that the Working Group on Eco Agriculture has been functioning under your Chairmanship. Can you give details?

Realizing the importance of Eco Agriculture such a Working Group has been created by ICFA (Indian Council of Food & Agriculture). It has an excellent and balanced representation from Farmers Organizations, Experts from Government and Non-Government bodies, industries, research institutions and universities. We already had two very successful Round Tables and a Road Map and Action Plan are being worked out. For this, 3 Expert Groups are formed as:-

1 Policy Thrust to plan and promote Eco Agriculture.
2 Agri Bio Inputs.
3 Scale up and Eco Agri Models.

Q–3: What are the major driving forces for moving from Green Revolution to Eco Agri Revolution?

Green Revolution brought a major jump in production of food grains. Chemical inputs did play an important role alongwith hybrid varieties and improved irrigation. However, in the picture today, the following have emerged:

a) The farm productivity have been going down particularly in

CONVENTIONAL AGRICULTURE (CA) IN ASIA HAS HAD SIGNIFICANT SUCCESSES BUT ALSO MAJOR ADVERSE IMPACTS IN RECENT DECADES

- Yields have risen but are slowing
- Over dependence on Synthetic Fertilizers & Pesticides and issues related to mono-cropping
- Soils and the environment are being massively damaged leading to poor Soil Fertility, Land degradation
- Poverty has fallen but is not being eliminated while inequalities are rising
- Highly vulnerable Climate change
- Farmers' and public health is being undermined
- Sustainability of smallholders farming
- Massive Fossil Fuel based energy intensive plants

the green revolution areas like Punjab, Haryana. Closely linked with this is the drastic reduction of organic carbon in the soil and lowering of the fertilizer use efficiency.

b) The problem of contamination of chemical pesticide in food, milk, river and water sources have been alarming in many situations.
c) The worldwide awareness of harmful effects of organo-chlorine and organo-phosphorous pesticide is clearly making impact on the Chemical Pesticide Industry.
d) Organic movements are on the rise.
e) Rain-fed agriculture is being looked up as a major sector to shoulder the larger burden of providing foods in developing countries.
f) Bio-pesticide and Bio-fertilizers industries are rising at a very high rate, though its size and contribution on a global scale is much smaller than chemical inputs.

There is thus the time and need for the next revolution- Eco Agri Revolution – A revolution that is sustainable, balanced and farmer-friendly.

Q–4: In the foreword of your recently published book "Eco Agri Revolution – Practical Lessons and the Way Ahead", (NIPA Publications), Prof. M.S. Swaminathan, has said that "Eco Agri Revolution is the pathway to Ever Green Revolution".

It was gratifying to hear him often say that and further emphasizing how we can achieve advances in productivity in perpetuity without ecological harm.

Realizing that farmers get convinced only when they see demonstrations and field results to convince them about the improvement in productivity, lowering of input costs and ecological improvement. The book lists field experiments from different parts of India and other countries. Therefore, he has called it "Do Ecology".

Q–5: Please tell us about your 20–20 Model as a way to bring ECO AGRI REVOLUTION and its acceptance for Asian and African Countries.

The "20–20 Model" is about increasing farm production by 20% with lowering of 'input' costs by 20% in sustainable model. It is based on using new generation eco-friendly bio inputs like Bio-fertilizers, Bio-pesticides (both – microbial and botanicals), from farm agro wastes etc.

In a way, it is the 'Middle Path' of moving from chemical to eco-friendly farming. It is also a practical model. We can't wish away chemicals overnight and there are many failed examples of such sudden switch overs. On the other hand, it is possible to have stepwise change over by including eco-friendly products that help reduce input costs on one hand and at the same time improve farm productivity sustainably. This is what the farmers want and have started accepting. Once this is demonstrated, in the next years, the bio inputs can be doubled and tripled and even total switch over.

To balance high inputs, outputs and maintain ecosystem has become a huge problem for each nation. Dr. Mehta leads a great team to introduce microbial technology into Waste Treatment, Soil Health reconstruction and development of eco agriculture and succeeded in India and many other Asian countries. This 20–20 model with higher production and lower input costs will surely bring a bright future for the agriculture in the world.

PROF. DR. JI LI
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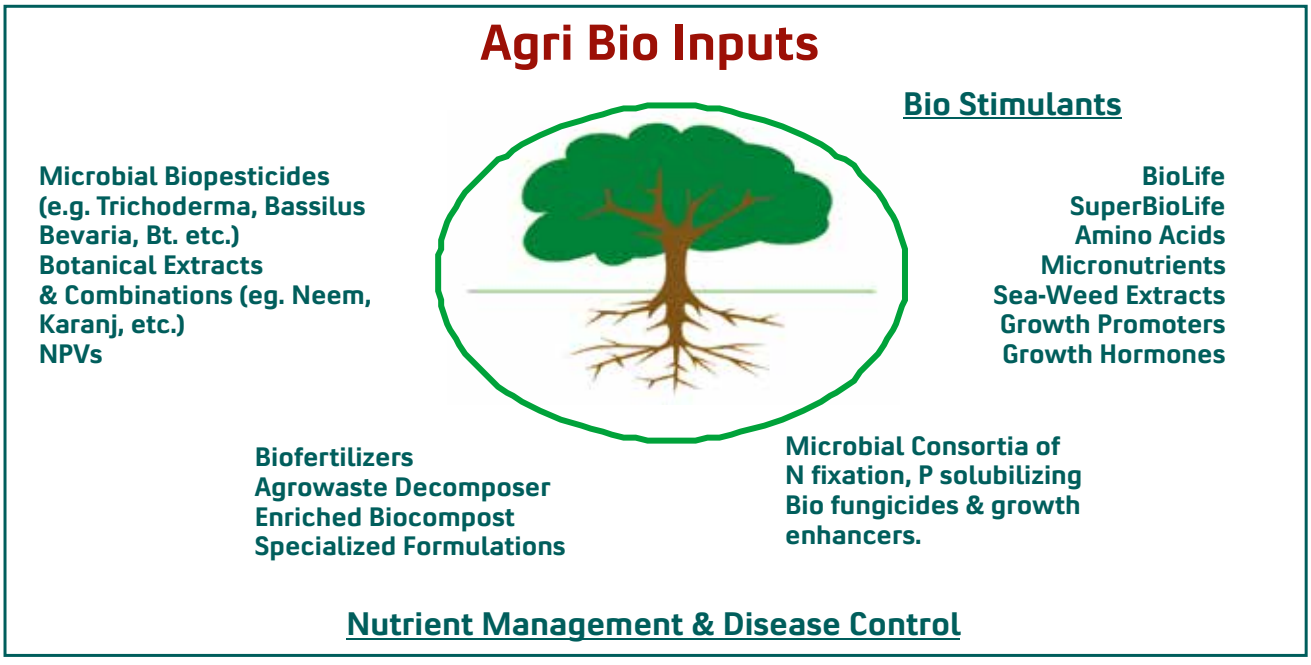
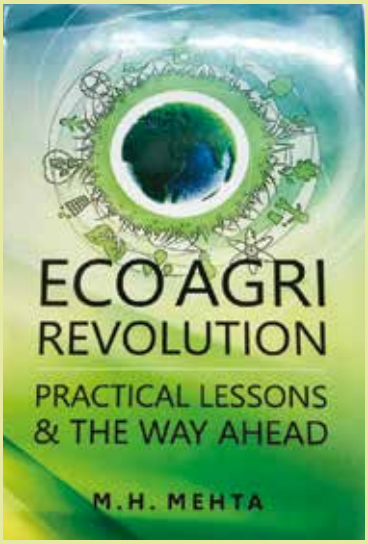
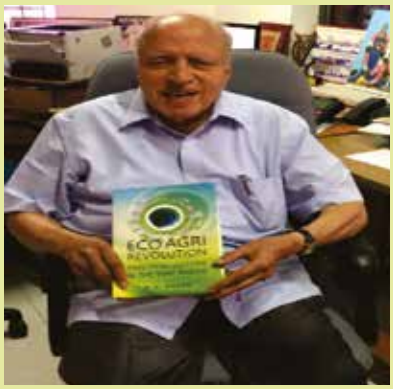
20.04.15



20:20 MODEL



- **Reduce agri-input costs > 20%**
- **Improve farm production > 20%**
- **New generation Agri bio inputs**



BIO (ECO) AGRI REVOLUTION FOR EVERGREEN REVOLUTION

It is good to see the gradual adaptation of this model in the different parts of India and even other countries in Asia and Africa.

Q–6: Is the scientific solution being suggested by you for Crop Residue Burning problem a part of Eco Agri Revolution?

As you know, scientific conversion of agro wastes to bio-composts is the most important component of Eco Agriculture. We have worked & demonstrated that using multi microbial sprays ('Relife') after crop residue harvesting and mechanical shredding, the agro wastes from residues of rice, banana, wheat etc. can be converted in-situ to highly useful Bio-compost. The challenge earlier was doing this in a short time of 20 to 30 days. This too is possible and has been demonstrated in the fields in Haryana, Punjab and Gujarat. It should immediately be taken up in a Big Way – especially in northern states like Punjab, Haryana, Western UP, Delhi etc. Crop residue burning plays havoc with the soil health, air quality and human health. On the other hand adopting this solution can help save a great deal of input costs, improve soil organic carbon and air quality. It can definitely become a most important component of eco agriculture practice. I am very impatient and hope that the implementation is taken up in a big way soon and convert the problem into opportunity for the benefit of all.

Q–7: What is the potential of eco agriculture in the objective of doubling the farm income?

Any exercise / report for doubling of farmers income would pertain to three areas:- (1) Productivity gains (2) Reduction in cost of cultivation and (3) Remunerative prices. For sustainable farming, lower input costs and production enhancement are extremely important requirement. These are also the main strong points of Eco Agriculture model.

There are also tremendous opportunities for new generation entrepreneurs. These industries are R&D based, small to medium scale and offer great opportunities to attract youth to work with farmers in a win-win situation.

Eco Agriculture model can and will play a major role in **IMPROVING FARMERS INCOME BY REDUCING THE INPUT COSTS AND IMPROVING FARM PRODUCTIVITY SUSTAINABLY.** It is based on new generation agri-bio inputs, scientific management of farm wastes, integrated farming and water use efficiency.

1. Africa needs Eco Agriculture or Agro Ecology Revolution.
2. Rather than trying to repeat the Asian Green Revolution Model. Africa should take up its own Model of Eco Agri Revolution bypassing the ill-effects of the Green Revolution.
3. The 20:20 Model – Higher Farm Production with lower input costs in Sustainable manner is the Model based on new generation, eco-friendly, cheaper Agri Bio Inputs, Integrated Farming, Scientific Agro Waste Utilization and improved Water and Fertilizer use efficiency.

BASED ON INTERVIEWS BY AGRICULTURE TODAY (INDIA) (2018) AND FARMERS' WEEKLY (SOUTH AFRICA)

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  Global Agriculture Leadership Award - 2012
  PADMA SHRI - 2011
  Millennium Leader of Asia Award - 2012
- Honored by Cornell University, USA & Beijing Agriculture University, China
- Published / invited lectures 250, 16 Patents and 4 books.
- Leads Mission on Eco Agri Revolution and River Revival – Vaho Vishwamitri Model Project.
- He is a keen sportsman and his other interests are literature and Music. Plays Kasth Tarang a rare Indian instrument.

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OPPORTUNITY AND FUTURE OF ORGANIC FOOD

Coronavirus pandemic has invoked a new thought process. It has raised questions about what we should eat, where is the food coming from and how the food is produced, stored, & prepared. There are concerns about the scientific modification of food, its availability at industrial levels, including the impact of chemicals and hormones in the food. These questions about food will have a lasting impact on our living habits.

From the pre-COVID days, the movement of vegan and vegetarian food was in vogue due to growing health concerns, especially in the western countries. After the outbreak of pandemic, the demand for vegetarian food is expected to rise exponentially, both domestically and globally. In the absence of a vaccine to fight the Corona virus, consumers are trying to increase their immunity by switching to chemical free food grown naturally and organically. This is leading to a surge in demand for organic and sustainable foods.

The pandemic has also opened new possibilities for a global restructuring of supply chains and shunned the blind dependence on China. Many raw ingredients used by the European and North America organic food companies are produced in Asia, Latin America and Africa. India is a major source of tea, spices, herbs, soya meal and various other products.

The unprecedented demand for organic food is credited to the traceability of its origins. The authenticity of organic food begins at the grass root level, right from its cultivation to the final processing. In order to maintain the quality of organic products, there is a need to sustain a clean and hygienic environment. This responsibility of sustainable production is entrusted to certification bodies. The regulatory authorities rely on the certification bodies to ensure a strict surveillance of the entire process from farm to fork.

The present global market size of the organic industry is $105 billion. USA and Germany are the two market leaders in the organic sector. There has been a shift in the consumers attitude since the last decade. An increased awareness about health concerns has led to opposition towards GMO food.

It is reported that due to coronavirus pandemic, retailers across the globe are experiencing hefty sales for organic products with a rise of 25%-100%. The question is - where will all this organic food come from?

Who will fulfil the demand supply gap? Could India step in as a global supplier of organic food? India has some natural advantages but also some supply constraints. If the supply issues can be fixed, then our country could become a natural source to fulfil the global demand for organic food.

At the home front, the online organic food business is growing at an astounding rate and an explosion is to follow. Online retailers are reporting the sales growing by 25-30%. The demand for organic products can be further harnessed by innovation and development of new products. Government is trying its best to encourage companies to take up and utilise these opportunities in sustaining and achieving the growth. Most consumers are aware that good diet and good health go hand-in-hand. However, the incessant rise of pocket friendly highly processed ready-meals acts as a deterrent. It lures the consumers to choose convenience over health. There is a need to educate the masses to make the right food choices. What is required is a slight nudge in the attitude from convenience to care.

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